543 443 WE HAVE classified the chief items observed at the fair between August 11th and 15th, 1936.

1. *Livestock.* Draught oxen, cows and calves, pigs and piglets. A few horses and goats. No sheep or fowl. The bargaining for cattle is completed when the buyer contrives to thrust a piece of silver into the hand of the seller. Acceptance of the earnest is followed by a hand-clasp.

[391] 2. *Agricultural Implements and Metal-work.*—It is said that gipsy-made metal tools were formerly displayed, but what little metal-work is now sold is factory-made and comes mostly from Czechoslovakia—cow-bells (of sheet-metal), horse-bells (of cast-metal), knives, etc. Hay-forks are gipsy-made, as are washing tubs and cradles, hollowed out of split tree trunks. Kitchen spoons are hand-carved. Wooden saddles and gipsy-made baskets and brooms may come under this head.

3. *Fruits and Vegetables.*—Tomatoes, potatoes, sweet-corn, onions, garlic, peppers, cabbage, water-melons, gherkins, aubergines, pears, apples, plums, blackberries. Also eggs and cheese.

[323] 4. *Pottery.*—The chief local craft is naturally well represented. The vessels, displayed on the ground, vary greatly in size, decoration and purpose; but they are all of brown clay, usually with simple floral patterns and debased geometrical designs in burnt sienna, yellow and green: vessels with or without lids, with or without handles, with or without spouts, glazed inside, outside, or both, in size ranging from salt-and-pepper stands to large waterpots. We find the old device of making pots in imitation of birds and animals.

● [282] 5. *Leatherwork.*—Several booths display white leather sheepskin waistcoats, having the wool inside and the outside decorated with applied strips of thin orange-dyed leather embroidered usually by machine stitching, but occasionally by hand. These waistcoats are made at Curtea de Arges. Leather belts, 4 to 6 inches wide, are machine-stitched but hand-tooled; they have buckle fastenings. Bridles and saddlery. Knotted leather thongs for whips. Hempen ropes for halters are sold in this section, too. Ready-made boots and shoes. The bulk of the shoes for sale, however, are made of rubber, in the shape of the traditional pointed shoe of skin. Most of them are cut from old motor tyres, but others are now made from specially manufactured rubber strips which repeat the patterns of the tyres.

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433 The alimentary industry includes the important sections of sugar-refining, milling, alcohol distillation, and brewing.

[288] The textile industries have shown the greatest expansion, owing to the excessive protection they have enjoyed. The woollen industry is capable now of producing excellent cloths, most of the yarn being supplied by the local spinning mills, which employ wools produced in the country.

The artificial silk and cotton mills obtain their yarn from abroad, practically duty free, and are able to supply about three-fourths of the local requirements. Only the better qualities of cottons are imported, while foreign silks are practically excluded by the prohibitive duty imposed on them.

The knitting industry has also secured a complete control of the market, and no foreign knitted articles are imported.

[313] The lumber industry was some time ago one of the most prosperous in the country. Until 1925 its output was about 3,200,000 cubic metres of timber, out of which some two million cubic metres were exported annually. Since 1930 the demand has fallen off very considerably, and huge stocks have accumulated, and as prices have dropped the sawmills are registering immense losses. Thus one well-known timber firm, the Foresta, had sustained a loss of 250 million lei during 1930, and it may be said that actually all the timber industry is in a very precarious condition, owing to its inability to cope with Russian competition.

[282] The leather industry obtains all its raw material locally, and its production of sole leather and uppers is sufficient for the home requirements. Even gloves, leather cases, etc., are manufactured locally, and only a very limited quantity of fine and superior leather is now being imported.

000 The following table shows a detailed list of imports during 1930:

CHAPTER VII

237 [439] The imported hides are in all probability largely heavy hides needed for sole leather. Those designated as "other hides and skins" are not important in tonnage, and exports are almost certainly all sheep and pig. The exports of leather are not very important, as they consist almost entirely of leather waste.

Total supplies of leather, available from internal slaughterings of cattle, calves, horses and buffaloes together with net imports, would be about 12,000 tons, of which 10,11,000 tons are derived from local hides and skins.

Part of the sheepskins were dewoolled and turned into leather, the wool being sold separately but a considerable number of skins was used as fleece lined jackets by the peasants. The total quantity of leather from the locally slaughtered sheep would, however, not exceed 750/1,000 tons.

Unlike Western countries, the pigs in Rumania are flayed and the skins tanned, so that the pigskin industry is certainly of material value, although not of major importance, compared with Rumania's total leather production.

2. Manufactures

295 Rumania's leather trade made rapid strides in pre-war years and, as the bulk of the leather was made into footwear, an important increase in this production was noticeable. Although no official statistics are available, it is estimated that Rumania produced 45,000,000 pairs of leather shoes in 1936 and, in addition, considerable quantities of peasants' footwear were manufactured in country districts.

The industry at that time consisted of about 20 machine shoe factories, six of which were owned and controlled by tanneries, mainly centred in Cluj, Timişoara, Bucarest and Oradea. In addition, numerous small shops existed throughout the country in which shoes were made by hand. With the loss of Northern Transylvania the machine-shoe centres of Cluj and Oradea went to Hungary.

3. Tanning Materials

282 [439] Rumania has in the past relied on other countries for practically all her tanning materials and extracts. She used to import about 8,000 tons of different extracts, about 50 per cent. of which were re-exported from the U.K., probably quebracho and wattle extract. Yugoslavia supplied her with about 2,000 tons of extract, presumably oak and chestnut.

(ii.) War-time Developments

1. General

Though Rumania has suffered during the war from a leather shortage, partly on account of reduced internal production, but more especially because of the increased requirements for the Armed Forces, this shortage has not been so severe as in most European countries.

It has been reported that the leather production in 1940 was 9,200 tons, but that the supply of raw hides fell from 19,000 tons pre-war to 11,000 tons in 1941. This is a severe drop, even assuming that the 19,000 tons included imported hides. A substantial decline in the available supplies of leather has, however, certainly taken place owing to the curtailment of imports, to clandestine slaughterings, and to exports of live cattle to the Axis.

An indication of the extent of supplies allocated for Army needs was contained in an official announcement that 68 per cent. of all untanned

282 cattle hides collected in September, October and November, 1941, were for this purpose. The remaining 32 per cent., plus the horsehides, pigskins and goatskins, could be used for civilian purposes. The result was that very soon insufficient sole leather was available for civilians, and repairs to footwear became difficult.

282 656 At present 80 per cent. of the cattle hides weighing over 16 kilos (35 lb.), and 20 per cent. of the hides weighing less than 16 kilos, are reserved for the Army. This leaves the civilians very short of sole leather, normally manufactured from heavy hides.

At the end of 1941, the Ministry of Supply ordered the registration of all leather stocks, and thereafter leather could not be sold without a permit. The entire purchasing and control of raw hides and skins and also the distribution of leather was placed in the hands of the "ORAP" (*Oficiul Român de Aprovizionare şi Distribuire a Produselor de Prelărie*).

In the autumn of 1941 private dealings in sheep and lambskins were forbidden, the Army Supply Minister having sole right of disposal. Owing to the comparatively important domestic output such a measure should not have been necessary, but was due to the Rumanian, and probably German, demands for warm clothing on the Russian front. Evidence received in 1942 shows that 80 per cent. of the skins are now reserved for the Army.

In July, 1942, leather transmission-belting, etc., was brought under control and made subject to certain restrictions.

295 434 Civilian rationing of footwear was introduced early in 1942 and new shoes could be sold only against permits issued to persons declaring possession of only one other pair of serviceable shoes. Repair cards were also issued. Requisition cards for new shoes are limited to one a year, and repair cards to one every four months. Children under 14 years of age can obtain two requisition cards yearly for new footwear.

The issue of permits does not, however, guarantee footwear supplies, and only about 50 per cent. of repair or purchase demands appear to be met.

The above regulations have been slightly modified from time to time, but remain intrinsically the same. The production of footwear of substitute materials, such as wooden soles, soles of artificial leather, leather waste, buna, etc., has gradually increased.

295 435 Despite the various government regulations the footwear Black Market flourished, and while the average pre-war price for a pair of men's shoes was 800 lei, in October, 1941, the official prices were fixed at about 1,500 lei for a standard pair of men's shoes and about 1,200 lei for a standard pair of women's shoes. In March, 1942, however, the Black Market price for men's shoes was 7/8,000 lei a pair, and this has now gradually risen to 10/12,000 lei. Complete soleing and heeling of men's footwear costs 1,250 lei officially, and women's 1,000 lei. The official price of soleing leather is 530 lei per kilo, whereas the Black Market price is 34,000 lei.

2. Tanning Materials

282 439 Before the war Rumania never made use of her own barks for tanning, as it was more economical to import extracts from overseas. During the war she has made attempts to employ her oak, chestnut, spruce and pine barks for tanning materials, but

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without much success, and has therefore reverted to her former practice of importing them.

In February 1942 it was reported that with imports from Italy, Turkey and Croatia Rumania had an eight months' supply in hand.

Under the 1942/43 Italo-Rumanian agreement Italy is providing her with 1,750 tons of chestnut extract, 1,000 tons of sumach and 735 tons of other materials. Turkey also agreed to supply her in 1942 with 1,000 tons of valex and 2,500 tons of valonea.

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D. BUILDING MATERIALS AND CEMENT

The building materials industry in Rumania is on a small scale and not highly mechanised employing a total of 16,000 workers in 1937, while the value of production in that year amounted to 1·6 milliard lei, about 2½ per cent. of total industrial production. In the decade before the war cement, which is the most important branch of this industry, had a steadily increased output reaching in 1939 a total of 531,000 tons, with an 800,000 ton capacity. Small quantities had to be imported.

The most important cement firms are at Cernavodă, Turda, Dudești, and Fieni. Since the war, due to limited building activity, consumption of cement has decreased, and was reported to have been 314,000 tons for the first ten months of 1942, the bulk of which was used for military requirements.

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After the recapture of Northern Bucovina and Bessarabia in mid-1941, a considerable amount of repair work had to be undertaken as a result of war destruction; but at the beginning of 1942 due to raw material and labour shortage all further reconstruction in these two provinces was forbidden. Later, in February, 1943, a decree